Document Control User Guide: System Set up

Rev. 06 – JAN. 2008

Introduction

By referring to this user guide, it is assumed that the user has an advanced working knowledge of Skandocs (i.e. the user can search, view, download and log documents in the database).

This guide will explain how to:

- Creating New Contracts
- Creating New Companies
- Creating Custom Functions
- Creating groups
- Creating a New Project
- Adding details to Users

For details on setting security please refer to the separate Skandocs Security user Guide for details.

Note:

If you need to add a New Contract or Project please contact a member of the Skandocs team for assistance.

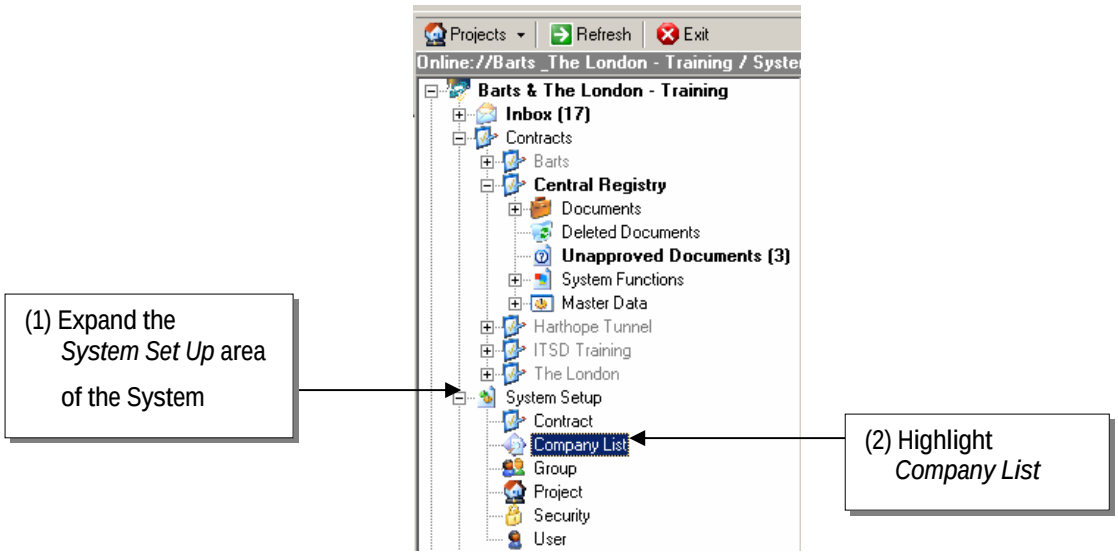
Setting a new Contract

Please contact a member of the Skandocs Team to set this up.

Adding New Companies to the Database

a. In the System Navigation area of the screen, click on the **+** beside ***System Setup*** and select ***Company List*** from the expanded list.

b. Click on the ***Create New Item*** icon found at the top left-hand corner of the upper screen.



c. In the bottom screen, type in the company details.

Note 1: 'Company Initials' *and* ***'Company Name'*** *are mandatory fields that must be completed.*

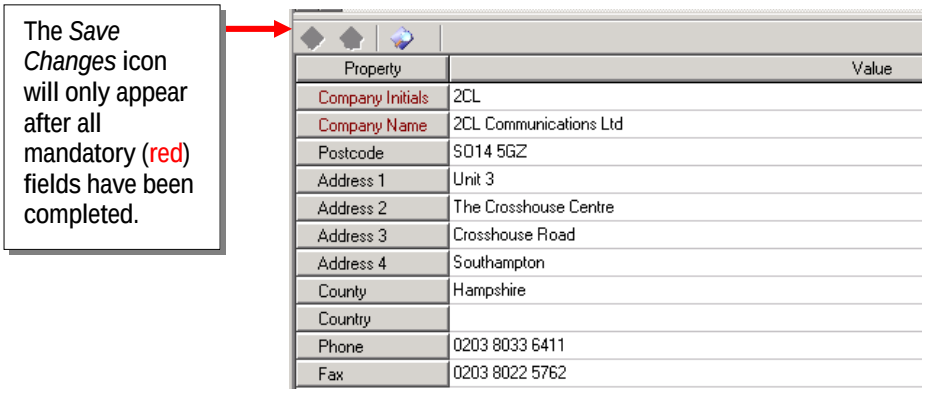
Note 2: *When typing in company initials, try to use initials that are relevant to the company.*

Note 3: *If the company postcode matches an existing postcode in the company list, an alert message will appear ('Possible Duplicate Company'), asking the user to confirm or change the new company's details.*

d. The remaining address fields below the *'Postcode'* field are optional data entry fields, **however,** *if these fields are left blank, the company address will be incomplete on any Transmittal Note generated for that company*.

e. Click on the ***Save Changes*** icon to save the new entry.

The Company List Data-Entry Screen

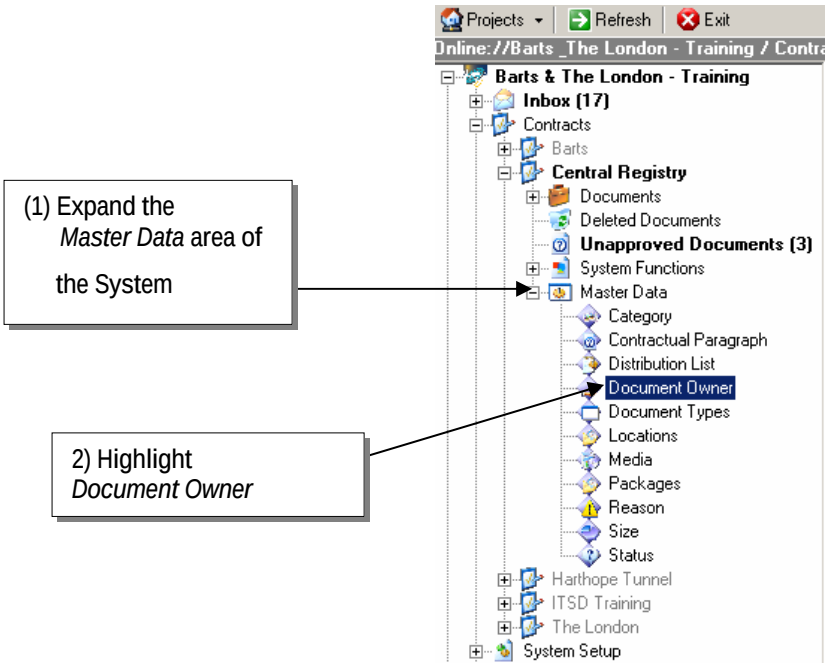


f. Repeat steps **b-e** to add additional companies to the database.

Note: *Although the new company (or companies) has been added to the database, its name will not appear (if conducting a search) in the 'Document Owner' drop-down list until the company's details have been added to the* ***Document Owner*** *area of the system.*

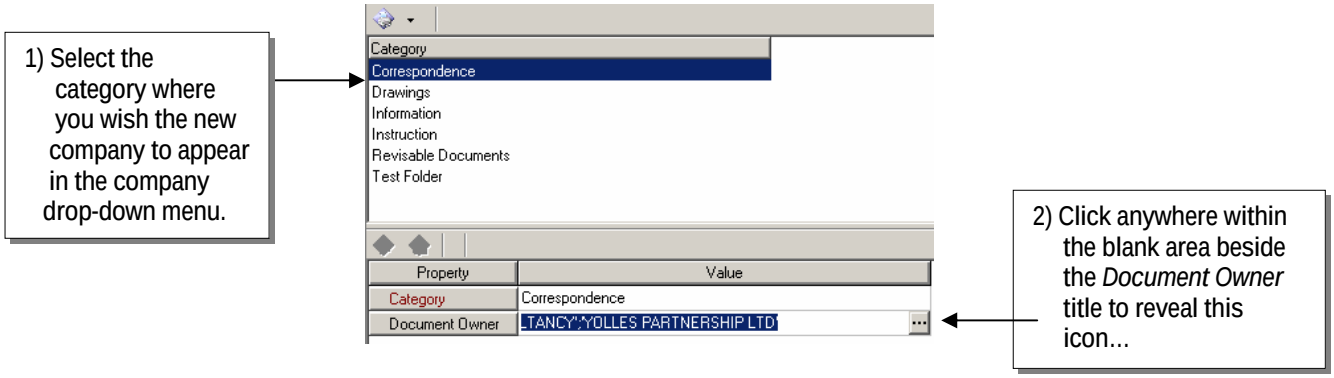
To allocate a company to the Document Owner list:

g. In the Navigation area of the screen, click on the **+** beside ***Master Data*** and select ***Document Owner*** from the expanded list.



h. In the upper screen, select the category where you wish the new company's name to appear in the *'Document Owner'* drop-down menu.

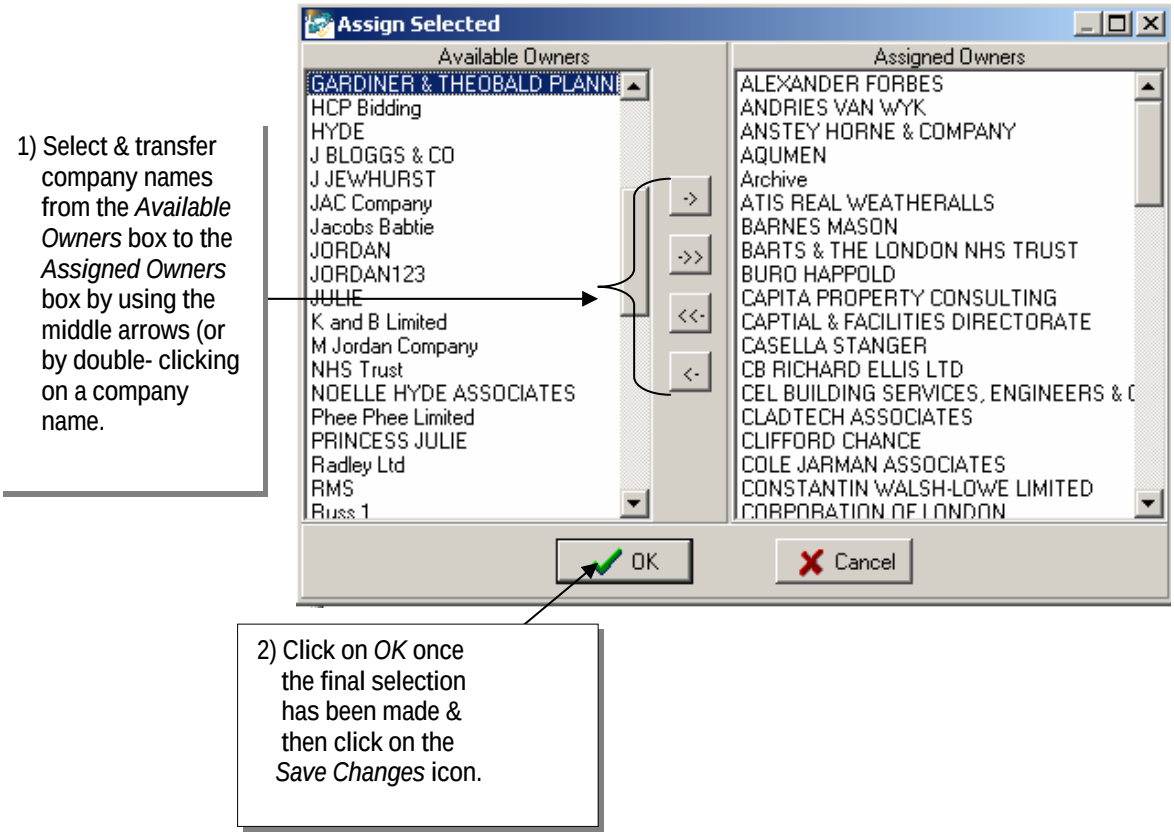
i. In the lower screen, click anywhere in the blank field beside ***Document Owner*** to reveal the **...** icon. Click on this icon to reveal the ***Assign Selected*** box.



j. In the left-hand ***(Available Owners)*** area of the box, search and highlight the name of the new company.

k. Either by double-clicking or using the available arrows, transfer the company name over to the right-hand **(*Assigned Owners***) area of the box. Multiple selections can be made by holding down the *'Ctrl'* key on the keyboard and highlighting selected names before clicking on the arrows.

l. Click on the ***OK*** box to confirm the selection before clicking on the ***Save Changes*** icon to save the new entry.



m. Re-select the project from the project drop-down list to ensure that the database has been updated with the new details.

Searching for Companies in the Company List Area

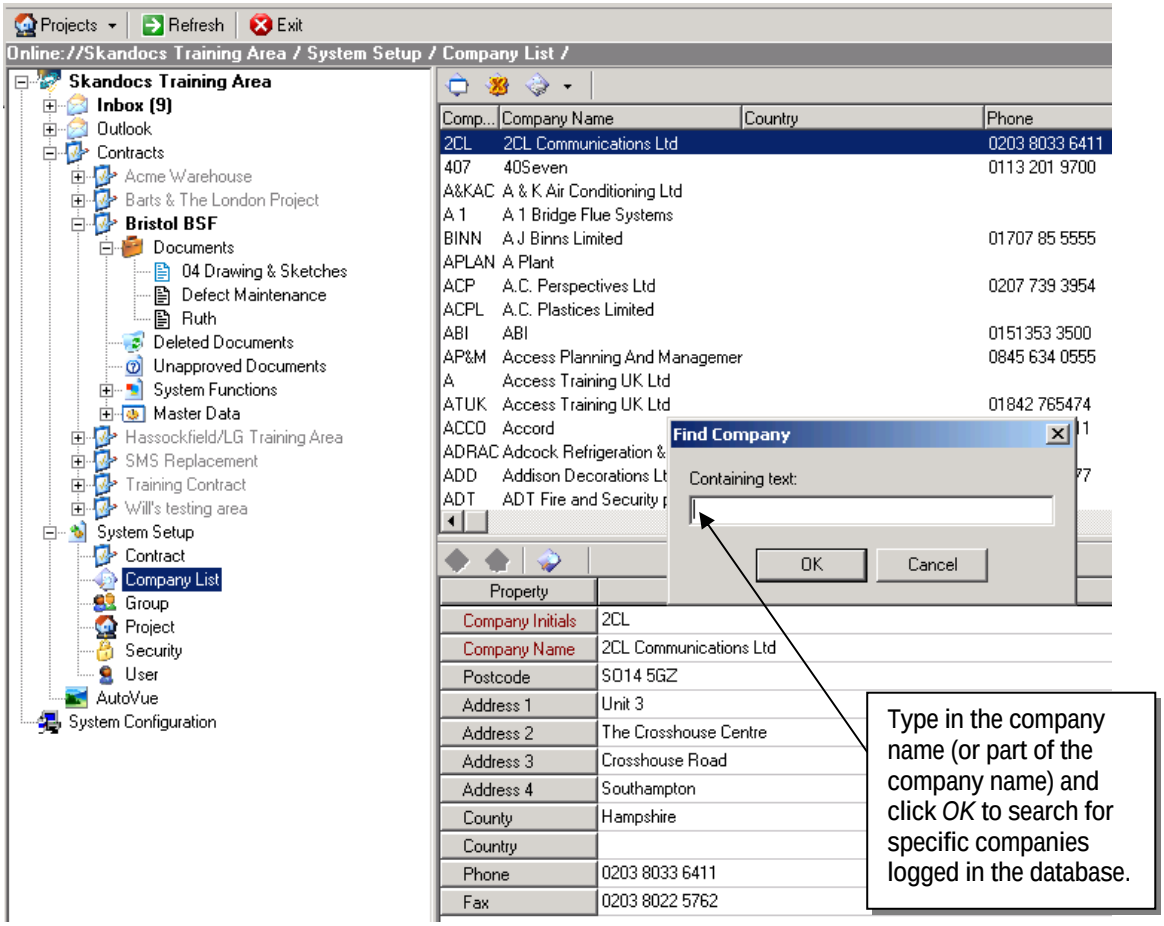
A user can search for specific company details logged in the database.

To search for a company:

a. In the System Navigation area of the screen, click on the **+** beside ***System Setup*** and select ***Company List*** from the expanded list.

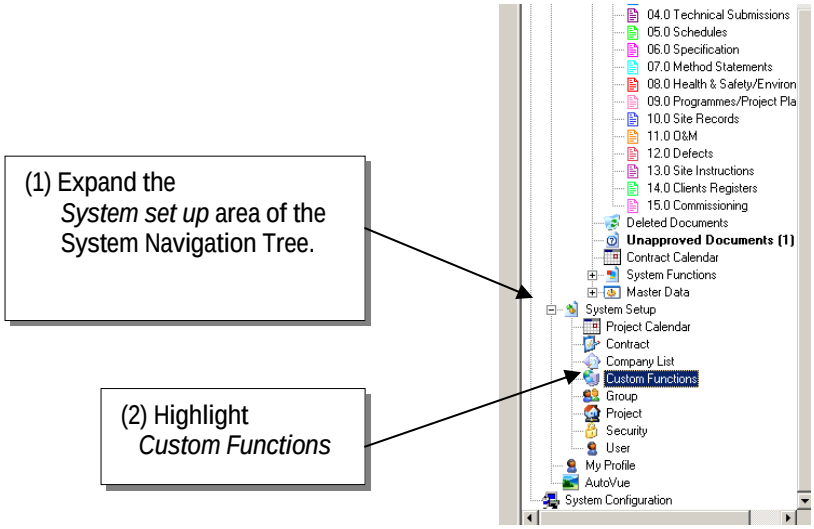
b. Click on the ***Find*** icon and in the ***Find Company*** window, type in the company name (or part of the company name) in the ***Containing Text*** field. Click on ***OK***.

c. The system will list all results (if any) relating to the information entered in the search field.

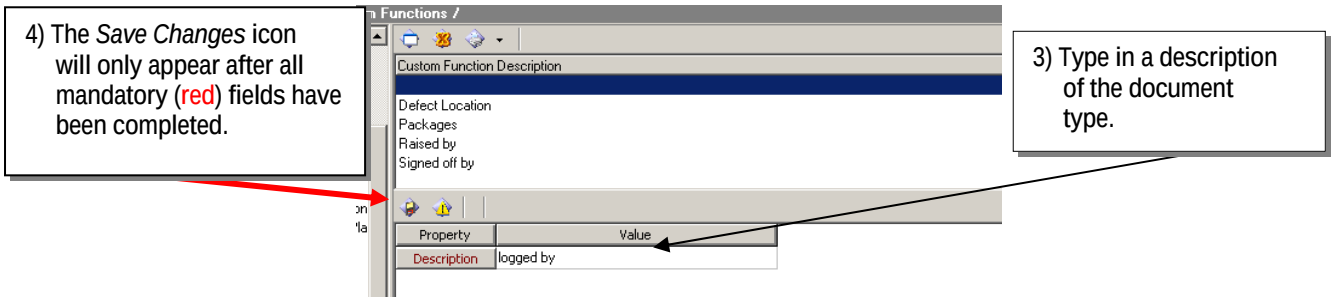


Adding Custom Functions

a. In the System Navigation Tree, click on the **+** beside ***System Set up*** and select ***Custom Functions*** from the expanded list.



b. Click on the ***Create New Item*** icon found at the top left-hand corner of the upper screen.



c. Type in a short description of the document type in the ***Description*** field (**Note:** this description will appear in the drop-down list whenever a search is made against document type).

d. Click on the ***Save Changes*** icon to save the new entry.

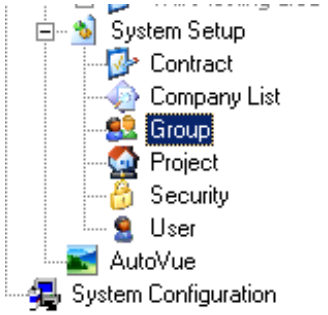
e. Repeat steps b-g to add additional document types to the database.

f. Re-select the project from the project drop-down list to ensure that the database has been updated with the new details.

Note: In order for the custom functions to appear in the categories, the document controller will need to add the function into the categories settings under Master Data. [Refer to User Guide: Categories].

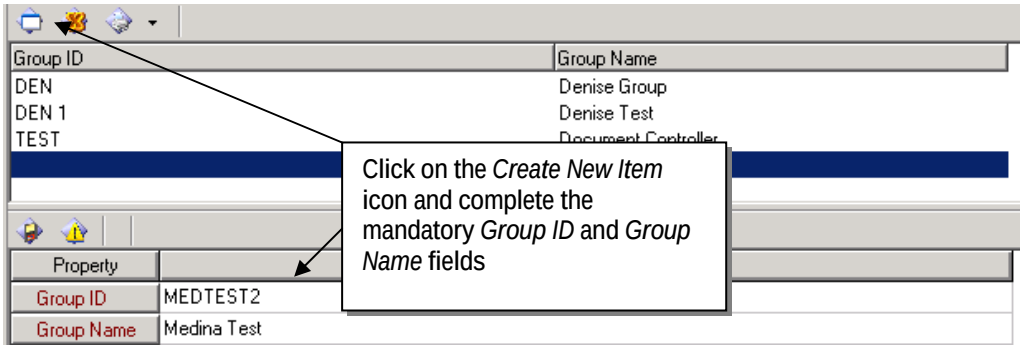
To create a group:

a. In the System Navigation area of the screen, click on the **+** beside ***System Setup*** and select ***Group*** from the expanded list.



b. Click on the ***Create New Item*** icon found at the top left-hand corner of the upper screen.

c. In the bottom screen, fill in the mandatory ***Group ID*** and ***Group Name*** fields (**Note:** The group name chosen will appear in the security area of the database and can be included on distribution lists).



d. Click on the ***Save Changes*** icon to save the information (**Note:** The *Save Changes* icon will only appear when both mandatory fields have been completed.

Note; - For setting security against a group, refer to Security User guide.

Please contact a member of the Skandocs Team to set this up.

Please refer to the separate Security User Guide for details.

Adding Users to the Database

Only the IT Helpdesk department and members of the Skandocs Applications team have access to this master database and only they have the ability to create Skandocs accounts for new users.

To request a new user to the database, send an email to the IT Helpdesk detailing the users:-

- Full name and company
- Email address
- Contact telephone number
- The project that you want the user to have access to

Only Document controllers from each project have authorisation to add new users to their project.

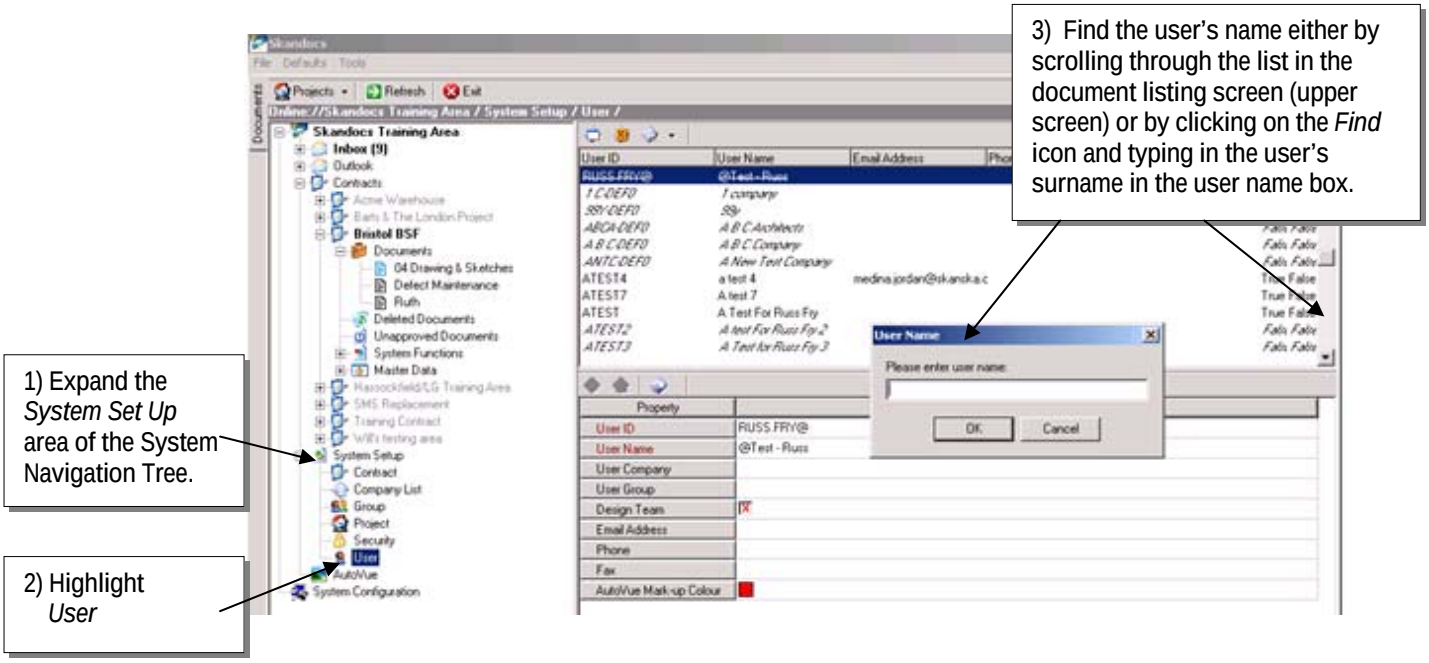
Assigning Users to a Company

Note: *New user's details must first be logged in the* ***Skandocs (Master)*** *database and their name allocated to a project before they can be assigned to a company within a project database.*

It is essential that users are then assigned to companies within a project database so that their names can be added to distribution lists and documents can be issued to their inboxes within Skandocs.

To assign a user to a company:

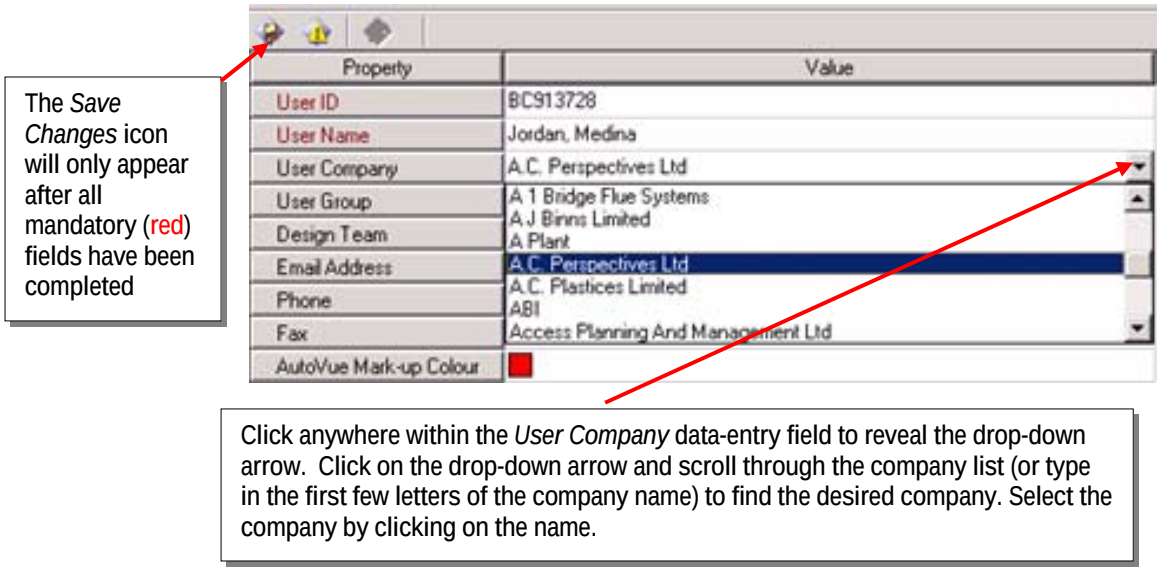
a. In the Navigation area of the screen, click on the **+** beside ***System Setup*** and select ***User*** from the expanded list. Find the user's name in the document listing screen (upper screen) either by scrolling through the list or by clicking on the magnifying glass (***Find***) icon, typing in the user's name at the prompt and then clicking ***OK***.



The User ID and User Name details in the below screen will be linked to the name that is highlighted in the document listing screen (upper screen).

b. To allocate a user to a company, click anywhere in the blank field beside ***User Company*** to reveal a drop-down arrow. Click on the arrow to reveal a drop-down list of all the companies that have been added to the database. Scroll through the list or type the first few letters of the company name to find the relevant company and click on the company name to select it.

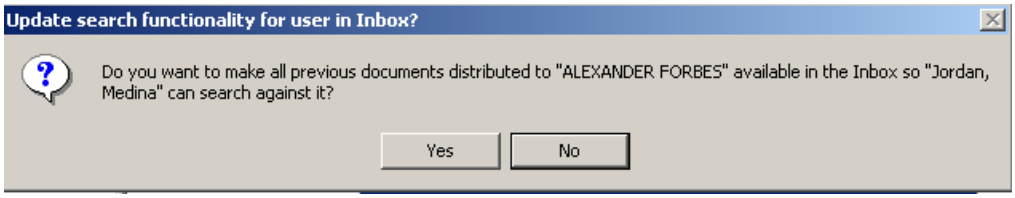
*(**Note:** The remaining (optional) fields can also be completed if necessary)*


The *Save Changes* icon will only appear after all mandatory (red) fields have been completed
Property
Value
User ID
BC913728
User Name
Jordan, Medina
User Company
A.C. Perspectives Ltd
User Group
Design Team
Email Address
Phone
Fax
AutoVue Mark-up Colour
A 1 Bridge Flue Systems
A J Binns Limited
A Plant
A.C. Perspectives Ltd
A.C. Plastices Limited
ABI
Access Planning And Management Ltd
Click anywhere within the *User Company* data-entry field to reveal the drop-down arrow. Click on the drop-down arrow and scroll through the company list (or type in the first few letters of the company name) to find the desired company. Select the company by clicking on the name.

c. Click on the ***Save Changes*** icon to save the entry.

Note: *the 'Save Changes' icon will only appear after all* ***RED*** *(mandatory) fields have been completed.*

d. Click on ***YES*** or ***NO*** in the alert box that appears asking whether all documents previously issued to that company are to be issued to the new user.


Update search functionality for user in Inbox?
Do you want to make all previous documents distributed to "ALEXANDER FORBES" available in the Inbox so "Jordan, Medina" can search against it?
Yes
No

e. Re-select the project from the project drop-down list to ensure that the database has been updated with the new details.

Assigning a User to a Group

A User can be assigned to a specific group within the database.

The creation of groups in the database may be useful when setting securities, for example; security settings can be set up on a *per group* basis, rather than on an individual account basis, thus reducing the time it takes to set up user accounts in the system.

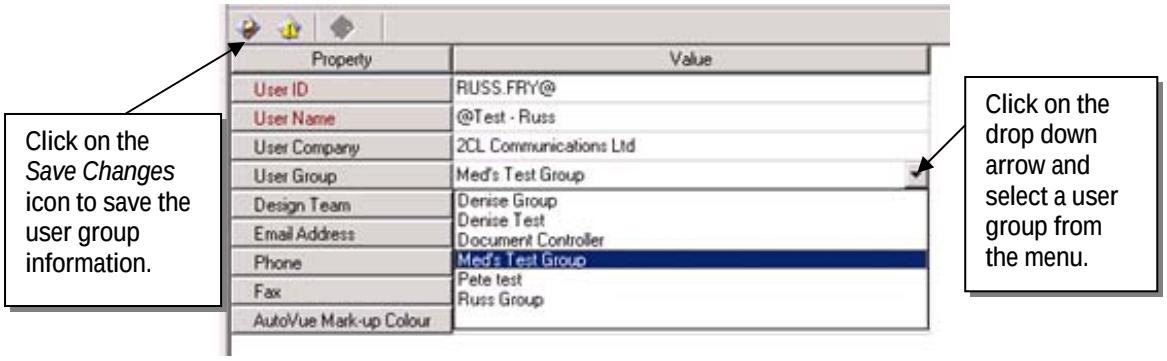
For example, groups can be set up for Document Controllers, for users who only require permission to view documents in certain categories (folders), and for users who only require access to the Skandocs Inbox.

Refer to [User Guide: Setting Security] for instructions on how to set group securities and how to set up a group.

a. Follow the instructions given above to find the name of the user you want to add to the group.

b. Click anywhere in the blank field beside ***User Group*** to reveal a drop down arrow. Click on the arrow to reveal a menu of all available user groups.

c. Select a group and click on the ***Save Changes*** icon to save the information (**Note:** the *Save Changes* icon will only appear after all mandatory (**red**) fields within this area of the database have been completed against that user).



To remove a user from a group:

a. Highlight the user group and press the ***Delete*** key on the keyboard. Click on the ***Save Changes*** icon to save the new information.

Assigning a User to the Design Team

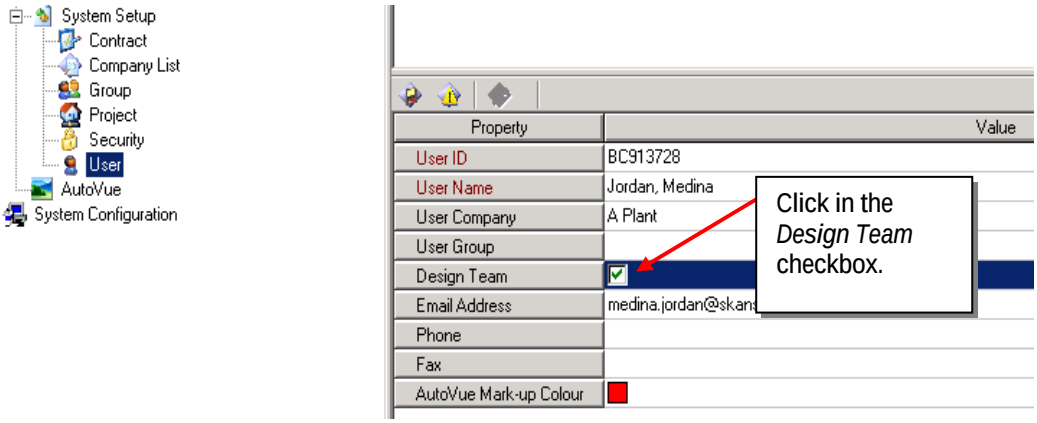
Members of a project can be given 'Design Team' status, where they have the ability to create new revisions and add new attachments to documents that do not originate from their own company.

To give a user design team permissions:

a. Follow the procedure for assigning users to a company (Section 11).

b. After the user has been assigned to a company, click in the ***Design Team*** checkbox.

c. Click on the ***Save Changes*** icon (**Note:** the ***Save Changes*** icon will only appear after all mandatory (**red**) fields within this area of the database have been completed against that user.



Adding the Users Email address

Email address: In order for the user to receive a Transmittal Note notification via their outlook account, their email address must first be added to the user section.

The user can also add their own email to the database by clicking on the 'My Profile' section and completing the relevant sections.

Optional Fields

Phone Number: Main contact number for the user

Fax Number: Users fax number

Assigning a Pen Colour to a User (for marking up documents in Autovue):

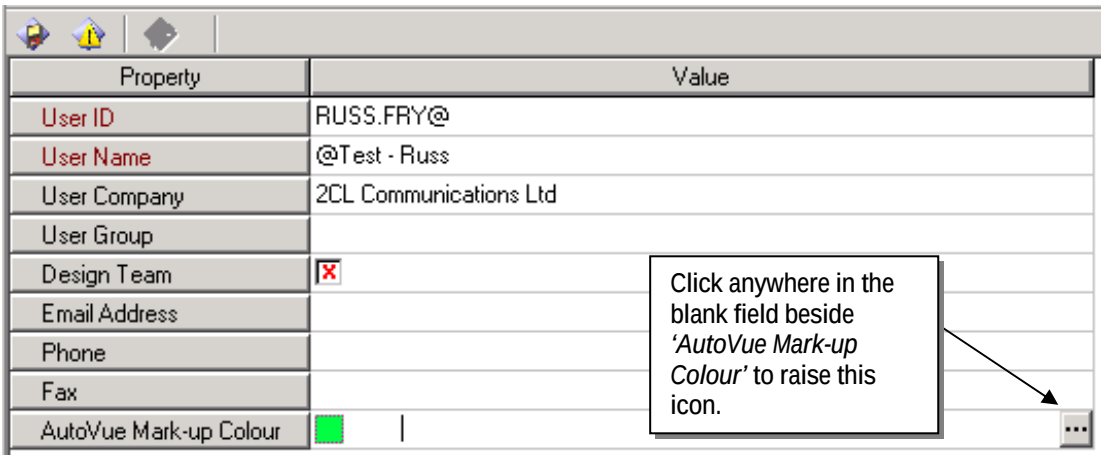
A project team may wish selected companies to comment (mark up) on drawings in Skandocs via the Autovue viewer/mark up software.

To distinguish which mark-ups belong to what company, Document Controllers can assign a user (or a group of users) a unique pen colour and record this information in the Skandocs database. **Please note**, however, that even if a specific colour has been chosen for a user, the user (once they have opened the Autovue software) is free to mark up documents using any colour they wish – there is no colour restriction facility available in the software.

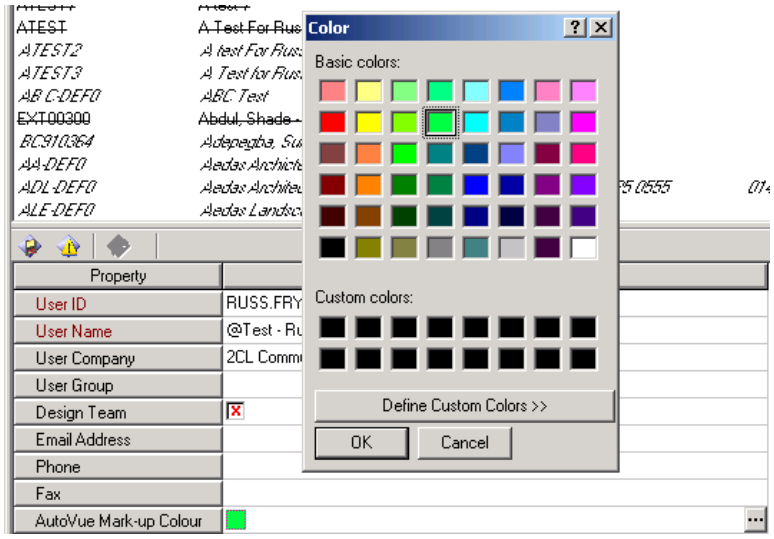
To assign a pen colour to a user in Skandocs:

a. Follow the procedure for assigning users to a company (Section 11).

b. After the user has been assigned to a company, click anywhere in the blank field beside ***Autovue Mark Up Colour*** in the bottom screen to reveal the **...** icon.



c. Click on the **...** icon to raise a window displaying all the available pen colours.



d. Select a colour and click on ***OK*** to close the window.

e. Click on the ***Save Changes*** icon to save the information (**Note:** the ***Save Changes*** icon will only appear after all mandatory (**red**) fields within this area of the database have been completed against that user).

Click on the *Save Changes* icon to save the pen colour information.